

Management System for Records



**ISO 30301
Syllabus**

AWARENESS ISO 30301 TRAINING

GENERAL INFORMATION



Awareness training is a one-day program covering the basic concepts and requirements of ISO 30301. The training provides insight into the advantages of implementing a Management System for Records for organizations, society, and governments.



EXPECTATIONS AND GOALS

By attending the program, candidates are expected to be able to:

1. Identify the basic concept and principles of risk management
2. Comprehend the basic elements of a Management System for Records (MSR)
3. Identify the key requirements of ISO 30301
4. Understand the concepts, approaches, methods, and techniques used to implement a Management System for Records



WHO SHOULD ATTEND

- Individuals interested in the management of records
- Individuals seeking to gain knowledge about the main processes of Management System for Records (MSR)



PROVIDED MATERIALS

You will get the following materials to support you during the training:

- The training module and case studies
- Certificate of Attendance

1 day

AWARENESS
ISO 30301
RAINING

Training Agenda

Day

Topic

Day 1

Introduction to Management System for Records based on ISO 30301

Key definitions in ISO 30301 standard

Principles and concept of ISO 30301

Awareness training is a one-day program covering the basic concepts and requirements of ISO 30301. The training provides insight into the advantages of implementing a Management System for Records for organizations, society, and governments.

IMPLEMENTER ISO 30301 TRAINING

GENERAL INFORMATION



This intensive 2-day professional course provides practical guidance for implementing a Management System for Records (MSR) based on ISO 30301:2019. The training focuses on implementation strategy, operational controls, governance, risk-based thinking, and certification readiness.

Participants will gain practical understanding through implementation workshops, case studies, and structured implementation exercises suitable for organizations preparing for ISO 30301 adoption or certification.



EXPECTATIONS AND GOALS

By attending the program, candidates are expected to be able to:

1. Understand the structure and requirements of ISO 30301:2019
2. Interpret the clauses and annexes of ISO 30301
3. Conduct MSR implementation gap analysis
4. Develop MSR policies, objectives, and governance structures
5. Establish records processes and operational controls
6. Implement documented information controls and retention systems
7. Conduct monitoring, internal audits, and management reviews
8. Prepare organizations for ISO 30301 certification



WHO SHOULD ATTEND

- Records Managers
- Document Controllers
- Compliance Officers
- Governance and Risk Personnel
- Internal Auditors
- Quality Management Representatives
- Corporate Secretaries
- Information Management Teams
- Consultants and Implementers

IMPLEMENTER ISO 30301 TRAINING

PREREQUISITES

Participants are recommended to have:

- Basic understanding of records management
- OR
- Prior attendance in ISO 30301 Awareness/Foundation training



TRAINING DURATION

2 Days (16 Hours)



TRAINING METHODOLOGY

- Interactive presentation
- Case studies
- Group discussions
- Clause interpretation
- Implementation workshops
- Practical exercises
- Gap assessment simulation



PROVIDED MATERIALS

- Training slides
- Participant workbook
- Case studies
- Templates and implementation toolkit
- Sample procedures and forms
- Certificate of Completion

2 days

IMPLEMENTER
ISO 30301
TRAINING

Training Agenda

Topic

Day 1

ISO 30301 Framework and Strategic Implementation

Module 1 — Introduction to ISO 30301

- Overview of records management principles
- Relationship between ISO 30301 and ISO 15489
- Benefits of MSR implementation
- PDCA approach and High-Level Structure (HLS)

Module 2 — Clause 4: Context of the Organization

- Internal and external issues
- Interested parties
- Scope determination
- Establishing MSR

Workshop

- SWOT and interested parties analysis
- Scope definition exercise

Module 3 — Clause 5: Leadership

- Leadership commitment
- Policy development
- Roles and responsibilities
- Governance structure

Module 4 — Clause 6: Planning

- Risks and opportunities
- MSR objectives
- Implementation planning
- KPI establishment

Workshop

- MSR policy drafting
- Risk register development
- Objective and KPI workshop

2 days

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ISO 30301
TRAINING

Training Agenda

Topic

Module 5 — Clause 7: Support

- Resources and competence
- Awareness and communication
- Documented information control

Workshop

- Document control matrix exercise
- Competency mapping exercise

Day 2

Operational Control and Certification Readiness

Module 6 — Clause 8: Operation

- Operational planning and control
- Records creation requirements
- Classification and metadata
- Retention and disposition
- Access control and preservation
- Digital records management

Workshop

- Retention schedule development
- Records lifecycle mapping
- Classification structure exercise

Module 7 — Clause 9: Performance Evaluation

- Monitoring and measurement
- Internal audit
- Management review

Workshop

- Internal audit simulation
- Audit evidence identification

2 days

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ISO 30301
TRAINING

Training Agenda

Topic

Module 8 — Clause 10: Improvement

- Nonconformity management
- Corrective action
- Continual improvement

Workshop

- Root cause analysis exercise
- Corrective action development

Module 9 — Certification Preparation

- Certification process overview
- Stage 1 and Stage 2 audit preparation
- Common implementation gaps
- Evidence preparation

Final Workshop

- Gap assessment simulation
- Implementation roadmap development

Examination

Examination Method

- Multiple-choice questions
- Scenario-based analysis
- Practical implementation exercises

Passing Criteria

Minimum score: 70%

Learning Outcomes

Upon successful completion, participants will be able to:

- Support and lead ISO 30301 implementation activities
- Develop MSR documented information
- Conduct implementation gap analysis
- Prepare organizations for certification assessment
- Improve records governance and compliance practices

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